NORTHWEST TERRITORIES

2006 Visitor Exit Survey

Outdoor Adventure

Tourism and Parks

Investment and Economic Analysis

Industry, Tourism and Investment
October 2007

Northwest Territories Industry, Tourism and Investment

Acknowledgements

The 2006 Visitor Exit Survey was made possible through funding provided by the following organizations:

- **Indian and Northern Affairs Canada – Strategic Investment in Northern Economic Development (SINED)**
- **Parks Canada**
- **Government of the Northwest Territories – Industry, Tourism and Investment**

For more information, or for a electronic copy of this report, please contact the following:

Coordinator, Research and Planning
Tourism and Parks Division
Government of the NWT
Industry, Tourism and Investment
P.O. Box 1320
Yellowknife, NT X1A 2L9

Tel: (867) 920 – 3245
Fax: (867) 873 – 0163

www.iti.gov.nt.ca/parks/tourism/research_and_statistics.htm

Cover photo by Marian Pealow

TABLE OF CONTENTS

TABLE OF CONTENTS III

LIST OF TABLES IV

LIST OF FIGURES IV

INTRODUCTION 1

- Objectives 1

SURVEY INSTRUMENTS AND METHODOLOGY 2

- Survey Locations 2

EXECUTIVE SUMMARY 3

OUTDOOR ADVENTURE VISITORS TO THE NORTHWEST TERRITORIES 6

- Number of Visitors 6
- Visitor Origin by Country 6
- Visitor Origin by Province and Territory 7
- Visitor Origin by US Region 8
- Gender 9
- Age 10
- Education 10
- Occupation 11
- Household Income 11

TRIP PLANNING 12

- Reasons for Choosing the Northwest Territories 12
- Information Sources used During Trip Planning 13
- Time frame for planning the trip 14

TRIP CHARACTERISTICS 15

- Past visitation to the NWT 15
- Mode of Transportation 15
- Accommodations 17
- Length of the Trip 17
- Party Size 18
- Party Characteristics 19
- Other Places Visited during this Trip 19
- Activity Participation 21
- Activity Satisaction Ratings 22
- Ratings of Outfitter Services and Equipment 23
- Participation in Aboriginal Tourism Activities and Events 24
- Tourism Service, Product and Infrastructure Ratings 25
- Information Sources Used While in the Northwest Territories 26

TRIP EXPENDITURES 27

APPENDIX 1: LEISURE TRAVELLER SURVEY 28

LIST OF TABLES

Table 1: Survey Locations 2
Table 2: Visitor Numbers by Origin and Mode of Transportation 6
Table 3: Visitor Origin by Country 6
Table 4: Visitor Origins by Country and Type of Adventure Traveller 7
Table 5: Visitor Origin by Province and Territory 7
Table 6: Visitor Origin by US Region 8
Table 7: Information Sources Used during Trip Planning 13
Table 8: Mode of Transportation 15
Table 9: Visitor Ratings of Outfitter Services and Equipment 23
Table 10: Trip Expenditures, Total and Average Per Person 27
Table 11: Trip Expenditures by Category of Spending and Type of Travellers 27

LIST OF FIGURES

Figure 1: Visitor Origin by Province 8
Figure 2: Origin of US Outdoor Adventurers 9
Figure 3: Gender 9
Figure 4: Age Distribution 10
Figure 5: Level of Education 10
Figure 6 Occupation 11
Figure 7: Visitor Household Income 11
Figure 8: Reasons for Choosing the Northwest Territories 12
Figure 9: Information Sources used during Trip Planning 13
Figure 10: How many months ago did you *start thinking* about travelling to the NWT? 14
Figure 11: How many months ago did you make a *firm decision* to travel to the NWT? 14
Figure 12: First trip to the NWT? 15
Figure 13: Mode of Travel 16
Figure 14: Accommodations Used while in the NWT 17
Figure 15: Number of Nights Spent in the NWT 17
Figure 16: Distribution of Party Size, *Guided* Travellers 18
Figure 17 Distribution of Party Size, *Unguided* Travellers 18
Figure 18: Party Characteristics 19
Figure 19: Other Places Visited 19
Figure 20: Alternative Vacation Choices 20
Figure 21: Activity Participation 21
Figure 22: Activity Ratings 22
Figure 23: Participation in Aboriginal Events or Activities 24
Figure 24: Aboriginal Activity and Event Ratings 24
Figure 25: Reasons for not participating in an aboriginal event and activity 25
Figure 26: Tourism Service, Product and Infrastructure Ratings 25
Figure 27: Information Sources Used While in the NWT 26

INTRODUCTION

THE GOVERNMENT OF THE NORTHWEST TERRITORIES (GNWT) conducts a Visitor Exit Survey every four years to obtain baseline information on visitor numbers, spending patterns and visitation characteristics. Along with providing an accurate picture of visitation and spending for the survey year, these benchmark statistics are used to estimate numbers, spending and characteristics during the three years between the Visitor Exit Surveys.

The results of the 2002 Visitor Exit Survey have been compiled into a series of reports on various segments of the visitor population:

- Anglers
- Business Travellers
- General Tourists
- Hunters
- Outdoor Adventurers; and
- Travellers Visiting Friends and / or Relatives.

This report presents results for the Outdoor Adventure segment of travellers who visited the NWT between May 15, 2006 and September 15, 2006. For a broad overview of all visitors to the NWT, please refer to the summary report.

Implementing the exit survey in 2006 was particularly important because new investments were being made in all areas of tourism development under the GNWT's *Tourism 2010: A Tourism Plan for the Northwest Territories*. The new investments were made to encourage and improve tourism product development, infrastructure, training, marketing and research with the anticipated result of increased visitation to and spending within the Northwest Territories throughout the life of the *Tourism 2010* plan.

OBJECTIVES

The objectives of the 2006 Visitor Exit Survey included:

- Obtaining sufficient data to develop an estimate of total visitation to the Northwest Territories for May through September 2006.

- Obtaining sufficient data to develop estimates of total visitation and spending for the following segments:

    - Anglers
    - Business Travellers
    - General Tourists
    - Hunters
    - Outdoor Adventurers; and
    - Travellers Visiting Friends and / or Relatives.

- Gathering sufficient data to produce profiles of visitors of each of the segments described above.

- Gathering data on visitors' interest and participation in Aboriginal Tourism products.

SURVEY INSTRUMENTS AND METHODOLOGY

A variety of survey instruments and methods were designed and utilized for capturing data from the six visitor segments noted above. A copy of the general leisure survey (used as a base for all other survey instruments) can be found in the appendix.

The survey instruments for the 2006 Visitor Exit Survey varied according to segment and mode of transportation.

- **Self-administered surveys** were designed for anglers, hunters and outdoor adventurers, and were distributed to the guests by guides at outfitters' lodges. Business and leisure visitors travelling by air received self-administered surveys while waiting for their departing flights at airports throughout the territory.
- **Trip diaries** were distributed at visitor information centers (VIC) and a post-trip telephone survey was designed to capture detailed information from visitors travelling by road.
- **Tally count sheets** were developed to determine passenger numbers and basic trip characteristics at airports. The tally count surveys were used in conjunction with the hunting and fishing license database, the territorial park permit database and vehicle counts at ferry crossings to estimate total visitation volume to the territory.

A total of 10,674 surveys were completed between May 15, 2006 and September 15, 2006, including 992 self-administered surveys completed at various airports; 783 Trip Diary phone surveys; 656 self-administered surveys completed at outfitters lodges; 5,225 license plate counts at ferry crossings; and 3,018 tally counts completed at various airports.

Unless otherwise specified, results presented in this report have been weighted to reflect the total estimated visitor volume based on vehicle traffic at ferry crossings and airport tally counts.

Table 1 is a list of survey distribution and collection locations for the 2006 Visitor Exit Survey.

SURVEY LOCATIONS

Table 1: Survey Locations

Location	Airport Tally Counts	Self-Administered Surveys	Trip Diaries / Phone Survey
60th Parallel VIC			X
Acho Dene Native Craft Store and VIC			X
Blackstone Territorial Park Interpretive Centre			X
Dempster Delta VIC			X
Fort Simpson Airport	X	X	
Fort Simpson VIC			X
Fort Smith Airport	X	X	
Hay River Airport	X	X	
Inuvik Airport	X	X	
Norman Wells Airport	X	X	
NWT Outfitter Lodges		X	
Western Arctic VIC			X
Yellowknife Airport	X	X	

EXECUTIVE SUMMARY

From May 15 through September 15, 2006, the Department of Industry, Tourism and Investment (ITI) of the Government of the Northwest Territories conducted an extensive survey of visitors to the territory. During that period, an estimated 2,079 people visited for the purposes of outdoor adventure, representing 6% of total visitors.

Outdoor adventurers can be divided into two basic groups: those who purchased package services including a guide, and those who travelled independently without a guide (but may have rented equipment in the Northwest Territories (NWT). The number of guided visitors during the survey period is estimated at 1,229 people, while the volume of unguided adventures is estimated at 850.

Unguided adventurers travelled primarily by road (68%) while the majority of guided visitors travelled primarily by air (60%).

By origin, Canadians comprised the largest proportion of outdoor adventurers (68%), followed by Americans (22%), German-speaking Europeans (5.2%) and visitors from all other countries (3.5%). There were relatively larger proportions of non-Canadians among unguided adventurers; Canadians made up a much larger proportion of guided visitors than unguided.

Ontario, Alberta and BC accounted for over 90% of Canadian adventure visitors. Ontario residents comprised over half of guided Canadians, whereas 44% of unguided Canadians came from Alberta. Among Americans, adventurers from the Western states were much more likely to choose an independent trip, whereas those from states in the South and the East were much more likely to purchase the services of a guide.

While males comprised a larger proportion of both groups of adventurers, there were relatively more females among guided (43%) than unguided adventurers (40%).

The average age of outdoor adventurers was 40, with the largest proportion in the 51 to 60 years age of category.

Education and occupation of outdoor adventurers were commensurate with the high income levels observed for this segment overall. Over 75% had a university or college degree, and 32% were employed in professional or management occupations.

The primary motivator for over 90% of respondents for taking an outdoor ADVENTURE TRIP in the NWT was the availability of wilderness, isolation, landscape and wildlife.

Guided adventurers relied heavily on their outfitters for planning their trip, whereas unguided visitors tended to make greater use of NWT Tourism's information services and the Internet.

Most outdoor adventurers (over 75%) started thinking about a trip to the NWT within a year of the trip, and 62% made a firm decision within 6 months of actually visiting.

Forty-six percent (46%) of adventurers had visited the NWT on a previous trip.

The majority (57%) of outdoor adventure visitors travelled only by road to the NWT, although this proportion was higher for unguided (64%) than guided (46%) adventurers. Another 32% used both road and air, (28% for unguided and 40% for guided) and 11% travelled exclusively by air (8% for unguided and 14% for guided).

Fifty-five percent of guided adventurers used hotel or motel accommodation while on their trip in the NWT compared to 29% of unguided visitors. Guided adventurers also made more frequent use of bed and breakfasts (28%) compared to unguided visitors (under 2%). Wilderness camping was cited by 66% of guided adventurer respondents as accommodation, compared to 27% of unguided adventurers.

The average length OF STAY for the outdoor adventure segment was 14 nights, with over 50% spending between one and two weeks, and just over 20% spending between two and three weeks in the territory.

The average party size for guided visitors was 4.9 people, significantly larger than the unguided group, which was 3.5 people. Over 45% of parties comprised 2 people, and couples were the largest single party type for both unguided (51%) and guided (40%) visitors. Travelling with friends was the second largest type of party for both groups: 34% for unguided, and 30% for guided adventurers.

Over 70% of outdoor adventurers travelled through Alberta on their way to the NWT, and over 50% also visited British Columbia. Over 35% also visited the Yukon, and almost 15% included Alaska in their travels.

While 22% of responses from outdoor adventure visitors indicated that they would not have gone anywhere other than the NWT in the summer of 2006, 18% indicated Yukon as an alternate destination, 13% were considering a destination outside of North America, 11% selected northern Canada or Nunavut, and 10% considered BC as an alternate to the NWT. Eleven percent of responses included a variety of non-northern Canadian locations as alternate trip destinations, and Alaska was considered by 6%.

Wildlife viewing, photography, sightseeing and shopping were the four most frequent activities that outdoor adventure visitors participated in. However, all activities in which this segment participated received high ratings. In relative terms, shopping was rated the lowest in terms of satisfaction, whereas aircraft tours, rafting, canoeing and photography received the highest ratings.

Adventurers who purchased guide services gave high ratings to all of the equipment and services provided by their outfitters. Guides received the highest rating, 4.9 out of 5.

Forty-seven percent of outdoor adventurers indicated that they had participated in an aboriginal event or activity. By far the most frequent activity was visiting a visitor centre with aboriginal content, followed by galleries with aboriginal arts and crafts, then museums with aboriginal content. Participation in more hands-on activities (such aboriginal outdoor adventures were less frequent. For those who did not participate in an aboriginal event or activity, availability and lack of awareness of availability were the two most frequent reasons cited.

Campgrounds (value, service and amenities), airport and visitor centres were rated 4 or higher in terms of satisfaction (5 being highest rating and 1 the lowest). Arts and crafts, both selection and price, were rated the lowest of all tourism services, products and amenities.

Visitor information centres were used in similar proportions by both guided and unguided outdoor adventurers (47% and 48% respectively) as a source of information while in the NWT. As would be expected, for guided adventurers the outfitter and the guide were an important source of information while in the territory (46% and 40% respectively). However, guided visitors used the Internet much more frequently (14.5%) than unguided adventure travellers (3.6%).

Total spending by outdoor adventure visitors in the NWT between May 15 and September 15, 2006, exceeded $7.1 million, including prepaid package costs. Excluding package costs, travellers spent almost $2.5 million in the territory. On average, guided visitors spent $1,405 per person in the NWT compared to $862 per person for unguided travellers (exclusive of pre-paid package costs).

On a per-person basis, guided adventurers spent almost four times as much on commercial accommodation (hotels, motels and B&B's) as did unguided travellers. Unguided travellers spent more on campground fees on average and more on entertainment. Guided visitors, on average, spent almost twice as much on arts and crafts, while spending on souvenirs was about the same. The average spending on groceries was very similar between the two groups, but guided adventurers spent almost three times as much dining in restaurants

NUMBER OF VISITORS

BETWEEN MAY 15 AND SEPTEMBER 15, 2006, approximately 2,100 visitors travelled to the Northwest Territories for the purpose of outdoor adventure. Of these, 1,229 purchased guided adventure packages, and 850 travelled independently (although they may have rented equipment while in the NWT).

Table 2: Visitor Numbers by Origin and Mode of Transportation

Visitor Segment	Air				Road				Total Air and Road
	Canada	USA	Other	Total	Canada	USA	Other	Total	
Visiting Friends & Relatives	2,910	33	176	**3,119**	2,988	110	0	**3,098**	**6,217**
Hunting - Guided	163	820	83	**1,066**	61	84	5	**150**	**1,216**
Outdoor Adventure - Guided	553	109	80	**742**	414	73	0	**487**	**1,229**
Outdoor Adventure - Unguided	153	44	73	**269**	313	239	29	**581**	**850**
Total Outdoor Adventure	**705**	**153**	**153**	**1,011**	**727**	**312**	**29**	**1,068**	**2,079**
Fishing - Guided	961	1,336	23	**2,320**	67	14	0	**81**	**2,401**
Fishing - Unguided	793	647	60	**1,500**	1,404	0	0	**1,404**	**2,904**
General Touring	1,546	60	95	**1,702**	8,367	1,277	1,994	**11,638**	**13,340**
Total Leisure	7,079	3,048	591	**10,718**	13,614	1,797	2,028	**17,439**	**28,157**
Business	6,262	529	150	**6,940**	815	8	36	**859**	**7,800**
TOTAL	**13,340**	**3,577**	**740**	**17,658**	**14,429**	**1,806**	**2,064**	**18,298**	**35,956**

VISITOR ORIGIN BY COUNTRY

CANADIANS COMPRISE THE LARGEST PROPORTION of outdoor adventure travellers at 68%, followed by Americans (22%), German-speaking Europeans (Germans, Swiss and Austrians, 5.2%), and visitors from other countries (3.5%).

Table 3: Visitor Origin by Country[1]

Country	Visitors	Percent
Canada	1,432	68.0%
USA	464	22.0%
German-Speaking Europe	109	5.2%
Other	73	3.5%
Total	**2,078**	**100%**

[1] Total may not equal totals in other charts and tables due to rounding errors

CANDIANS WERE MUCH MORE LIKELY (79%) TO CHOOSE A GUIDED TRIP than adventure travellers from other countries. Americans and German-speaking Europeans were more likely to undertake an independent adventure trip than to choose a guided adventure. Table 4 presents the details.

Table 4: Visitor Origins by Country and Type of Adventure Traveller

Country	Guided		Unguided	
	Frequency	% of Total	Frequency	% of Total
Canada	967	78.7%	465	54.8%
USA	182	14.8%	283	33.3%
German-Speaking Europe	29	2.4%	80	9.4%
Other	51	4.1%	21	2.5%
Total	1229	100.0%	849	100.0%

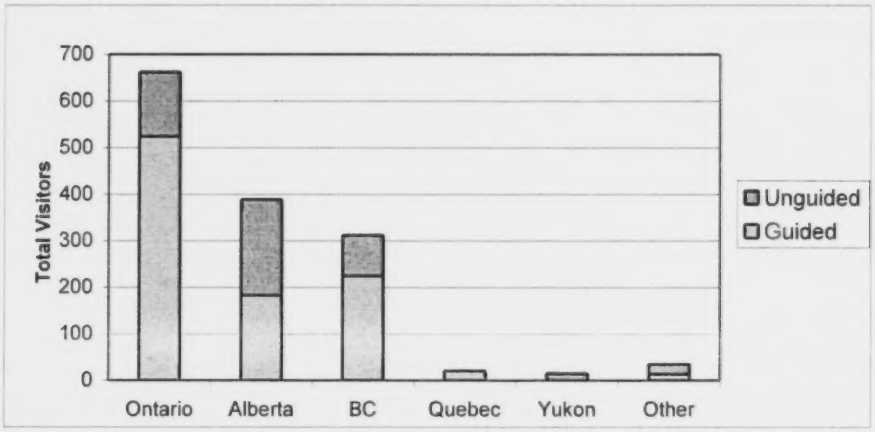
VISITOR ORIGIN BY PROVINCE AND TERRITORY

VISITORS FROM ALBERTA, BRITISH COLUMBIA AND ONTARIO accounted for over 90% of Canadian adventure travellers to the territory during the summer months in 2006. Among unguided adventurers, 44% came from Alberta, followed by Ontario at almost 30%, then BC at close to 19%. Over half of guided adventurers came from Ontario (54%), followed by BC (23%) and then Alberta at 19%.

Table 5: Visitor Origin by Province and Territory

Province	Total		Guided		Unguided	
	Frequency	% of Total	Frequency	% of Total	Frequency	% of Total
Ontario	662	46.2%	524	54.2%	138	29.6%
Alberta	388	27.1%	183	18.9%	205	44.0%
BC	312	21.8%	225	23.3%	87	18.7%
Quebec	21	1.5%	21	2.2%	0	0.0%
Yukon	15	1.0%	0	0.0%	15	3.2%
Other	35	2.4%	14	1.4%	21	4.5%
Total	**1433**	**100.0%**	**967**	**100.0%**	**466**	**100.0%**

Figure 1: Visitor Origin by Province



VISITOR ORIGIN BY US REGION[2]

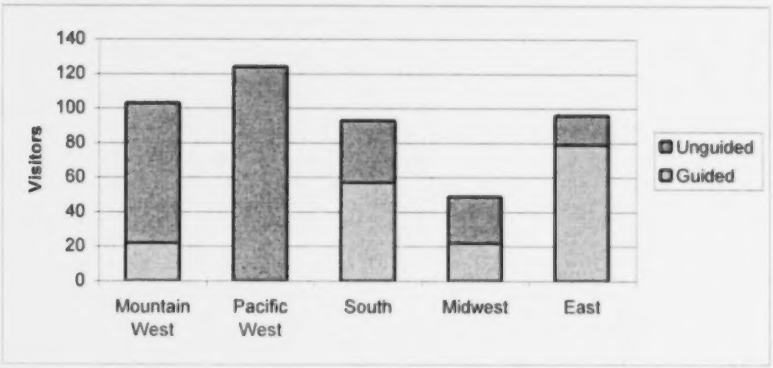
466 OUTDOOR ADVENTDURERS FROM THE UNITED STATES travelled to the Northwest Territories in the summer of 2006. Of those travellers, 38% purchased guided trips, and 62% travelled independently. Visitors from the Western states were much more likely to travel independently, while those from the states in the South and East were much more likely to use outfitters.

Table 6: Visitor Origin by US Region

US Region	Guided		Unguided		Total	
	Frequency	% of Total	Frequency	% of Total	Total	% of Total
Mountain West	22	12.2%	81	28.4%	103	22.1%
Pacific West	0	0.0%	124	43.5%	124	26.6%
South	57	31.7%	36	12.6%	93	20.0%
Midwest	22	12.2%	27	9.5%	49	10.5%
East	79	43.9%	17	6.0%	96	20.7%
Total	**180**	100.0%	**285**	100.0%	**466**	100.0%

[2] Regions as defined by the United States Census Bureau.

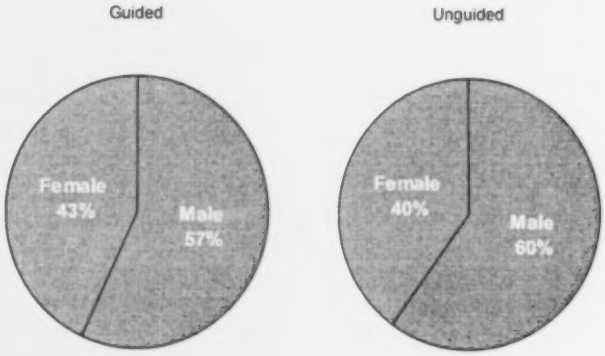
Figure 2: Origin of US Outdoor Adventurers



GENDER

BY GENDER, 60% of unguided adventurers were male and 40% were female. This proportion is significantly different statistically from guided visitors, among whom slightly higher proportions were female (43%) and correspondingly a lower proportion were male (57%) relative to unguided adventurers.

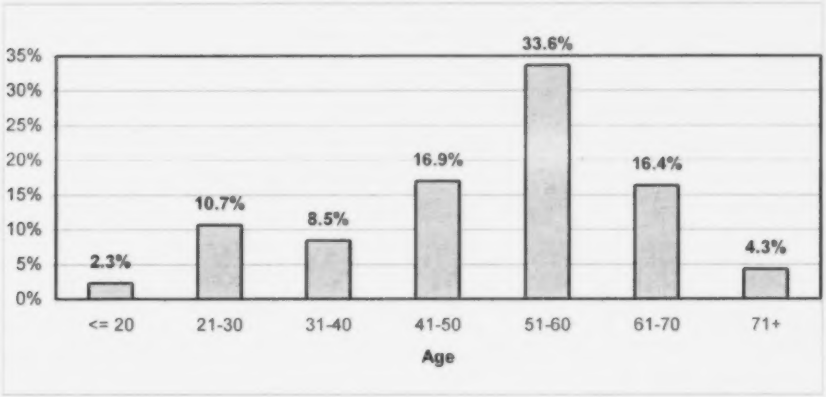
Figure 3: Gender



AGE

THE AVERAGE AGE OF OUTDOOR ADENTURE VISITORS to the NWT in 2006 was 40.1 years, with no significant difference between guided and unguided travellers. Figure 5 shows the distribution of age ranges of travellers. The age distribution is skewed toward older visitors, with over 30% in the 51 to 60-age category.

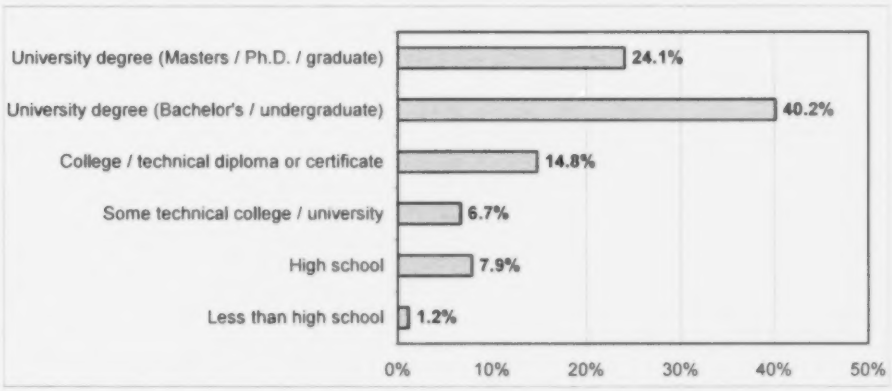
Figure 4: Age Distribution



EDUCATION

OUTDOOR ADVENTURE TRAVELLERS TO THE NWT in 2006 were very well educated – over 64% have a college or university degree, compared to 66% for all visitors surveyed.

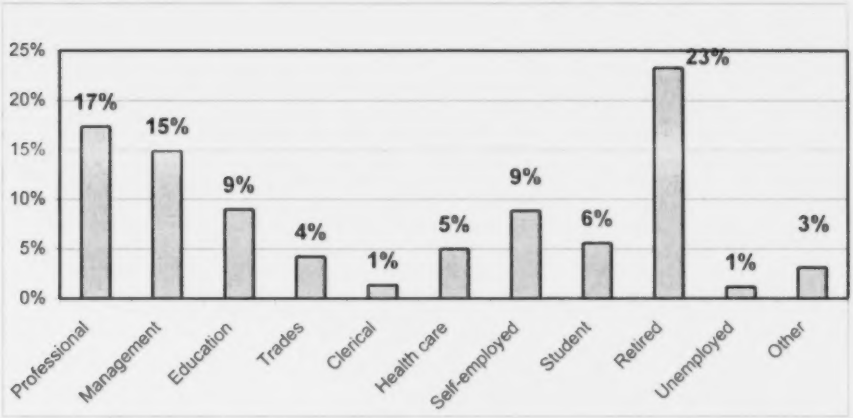
Figure 5: Level of Education



OCCUPATION

IN THE SUMMER OF 2006, 23% of adventure visitors to the NWT were retired, 32% were employed in professional or managerial occupations and 9% were self-employed or employed in the field of education. These proportions are very similar to visitors in the survey overall. The figure below shows a breakdown of visitors' occupations.

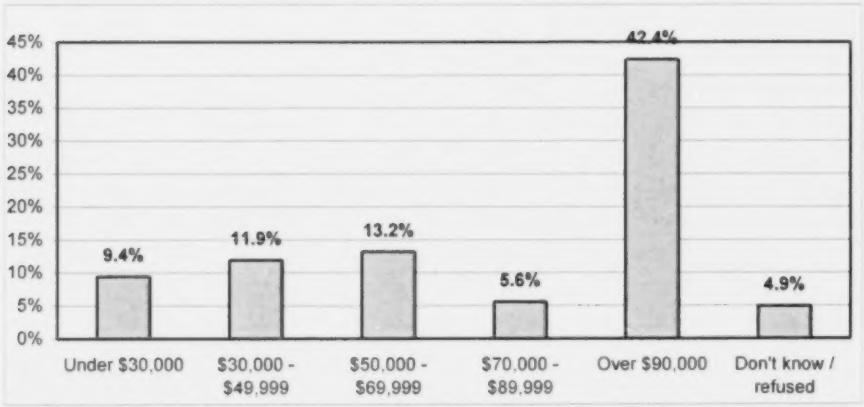
Figure 6 Occupation



HOUSEHOLD INCOME

OUTDOOR ADVENTURE VISITORS' ANNUAL HOUSEHOLD INCOMES were relatively high compared to visitors overall. Over 40% of adventure tourists visiting the NWT between May 15 and September 15, 2006 had annual household incomes in excess of $90,000, compared to 33% for visitors overall. No significant differences in income distribution were found between guided and unguided adventurers.

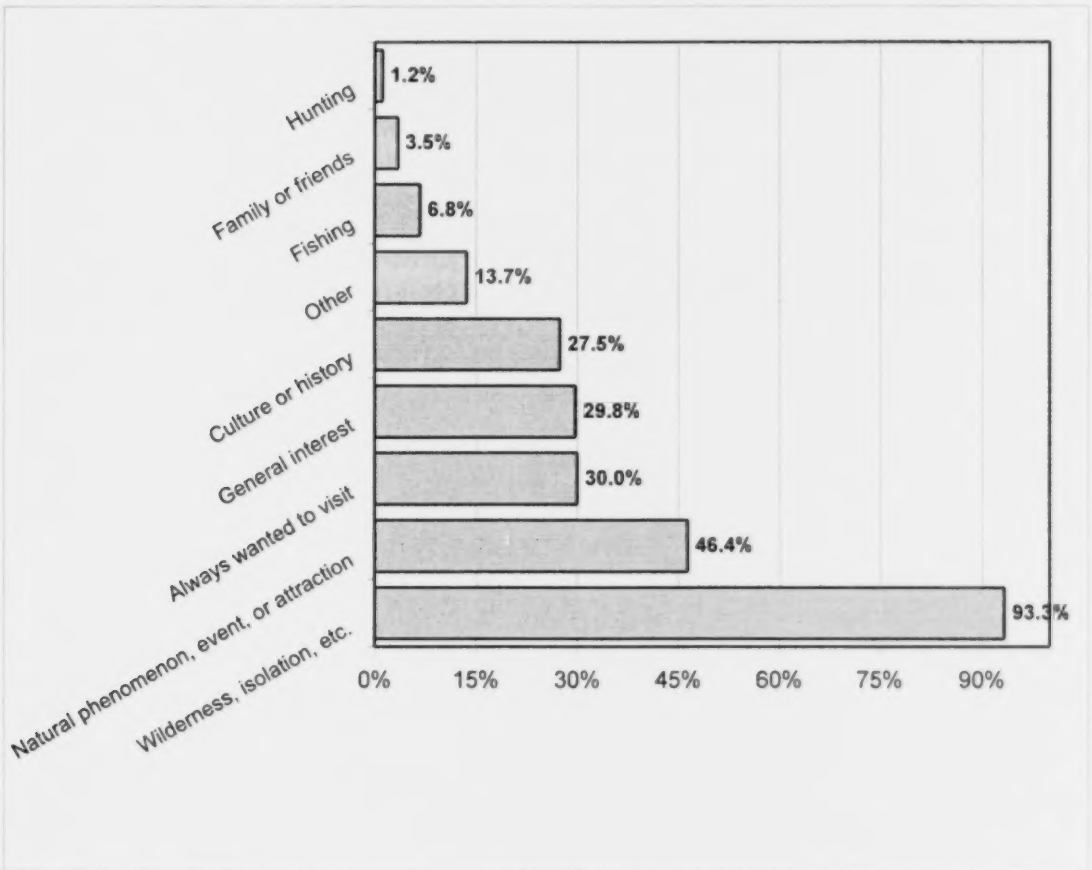
Figure 7: Visitor Household Income



REASONS FOR CHOOSING THE NORTHWEST TERRITORIES

VISITORS SURVEYED were asked why they chose the Northwest Territories as a vacation destination. Over 90% of outdoor adventure visitors cited wilderness, isolation, landscape or wildlife as a motivator, by the far the largest category of motivator for this segment. The next highest category was a natural phenomenon, event or attraction (just over 45% of respondents selected this motivator).

Figure 8: Reasons for Choosing the Northwest Territories



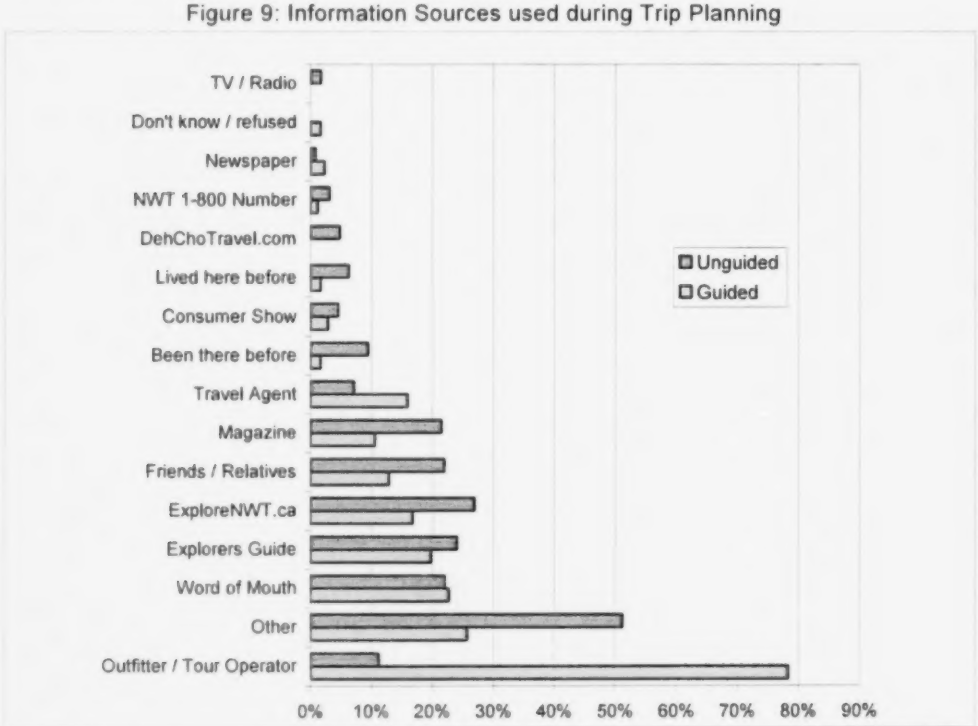
INFORMATION SOURCES USED DURING TRIP PLANNING

OUTDOOR ADVENTURE VISITORS USED A WIDE RANGE OF RESOURCES to plan their trip to the NWT. As would be expected, most travellers (78%) who purchased guided services used the outfitter or tour operator for information. Unguided adventurers used in higher proportions, information and services provided by Northwest Territories Tourism, the territory's destination marketing organization, including their Explorers Guide, website and toll-free number. Unguided adventurers also made greater use of the internet to plan their trip; over 50% of the "Other" category of information sources comprises Internet for independent adventurers, compared to 36% for visitors who purchased guided services. Word of mouth was an important source of information for both categories of adventure traveller, with 23% of guided, and 22% of unguided, visitors indicating that they used this source of information to plan their trip.

Table 7: Information Sources Used during Trip Planning

Source of Information	Guided	Unguided
Outfitter / Tour Operator	78.3%	11.2%
Other	25.7%	51.2%
Word of Mouth	22.8%	22.1%
Explorers Guide	19.8%	24.1%
ExploreNWT.ca	16.8%	27.0%
Friends / Relatives	12.9%	22.0%
Magazine	10.6%	21.5%
Travel Agent	16.0%	7.2%
Been there before	1.7%	9.5%
Consumer Show	2.9%	4.6%
Lived here before	1.7%	6.3%
DehChoTravel.com	0.0%	4.9%
NWT 1-800 Number	1.2%	3.2%
Newspaper	2.4%	0.9%
Don't know / refused	1.7%	0.0%
TV / Radio	0.0%	1.7%

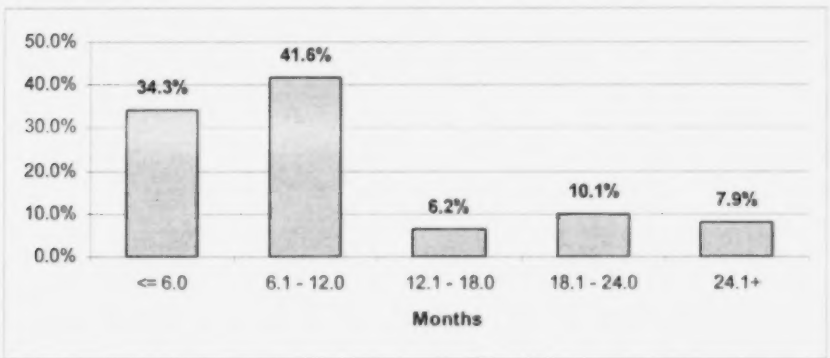
Figure 9: Information Sources used during Trip Planning



TIME FRAME FOR PLANNING THE TRIP

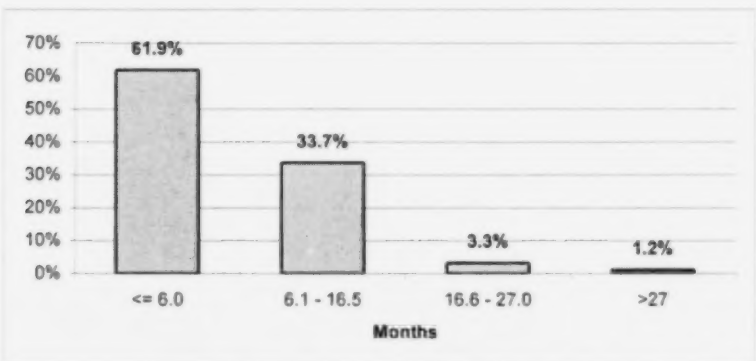
MOST OUTDOOR ADVENTURE VISITORS (OVER 75%) STARTED THINKING ABOUT A TRIP TO THE NWT within a year of actually visiting. Just over 16% began to consider a trip within 1 to 2 years of actually visiting, and almost 8% were already thinking about visiting over 2 years prior to coming to the NWT.

Figure 10: How many months ago did you *start thinking* about travelling to the NWT?



Most outdoor adventurers (62%) made a firm decision to take a trip to the NWT within 6 months of coming. Almost 34% made the decision to visit within 6 to 17 months of actually coming.

Figure 11: How many months ago did you make a *firm decision* to travel to the NWT?

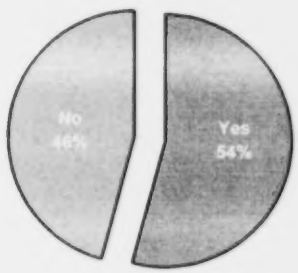


TRIP CHARACTERISTICS

PAST VISITATION TO THE NWT

A large proportion of outdoor adventurers (46%) had visited the NWT previous to their current trip. There was no statistically significant difference in past visitation among visitors based on country of origin, or unguided versus guided visitors.

Figure 12: First trip to the NWT?



MODE OF TRANSPORTATION

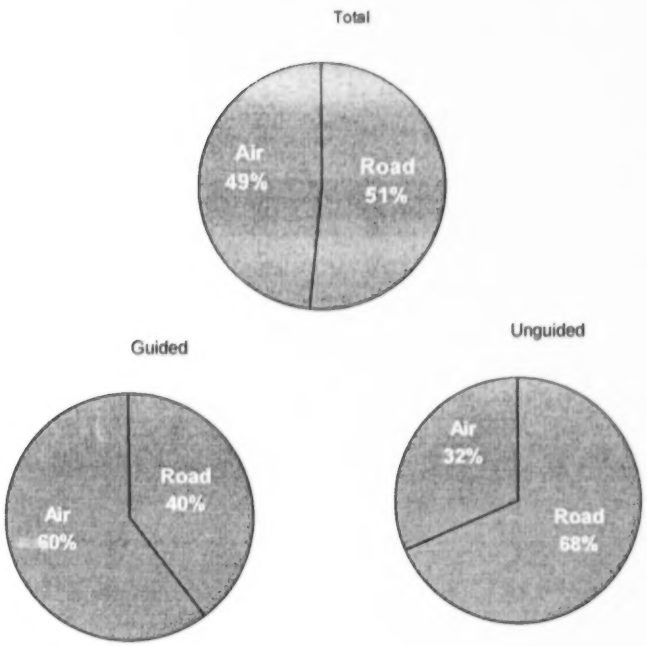
UNGUIDED ADVENTURE TRAVELLERS were much more likely to travel by road only (64%) compared to guided adventurers (46%). However, while travellers who purchased guided services were much more likely to have travelled by both air and road during their trip to the NWT (40%), a significant proportion of unguided travellers also used both modes of transport (28%). While air only was the least common form of travel for both categories of adventurers, guided travellers were more likely (14%) to have travelled only by air than unguided visitors (8%).

Table 8: Mode of Transportation

Mode of Travel	Guided	Unguided	Total
Road Only	46.3%	64.2%	57.3%
Road and Air	39.5%	27.5%	32.1%
Air Only	14.1%	8.2%	10.5%
Total	100.0%	100.0%	100.0%

FIGURE 1 SHOWS THE MODE OF TRANSPORTATION of outdoor adventurers according to guided and unguided visitors. Unguided visitors travelled primarily by road (68%) while the majority of those who purchased guide and package services travelled by air (60%).

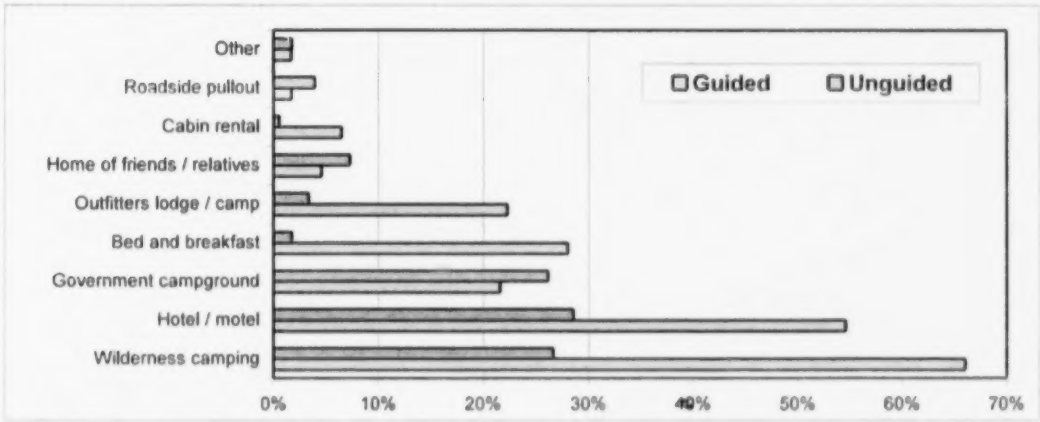
Figure 13: Mode of Travel



ACCOMMODATIONS

WILDERNESS CAMPING was the most common type of accommodation (66%) used by guided adventure travellers in the NWT. Guided visitors were frequent users of hotels / motels (55%) or bed and breakfasts (28%), and 28% also stayed in government campgrounds. Twenty-seven percent of unguided adventurers cited wilderness camping as accommodation, and 29% stayed in hotels or motels, while 26% stayed in government campgrounds during their trip. Less than 2% of unguided visitors used bed and breakfasts while in the NWT.

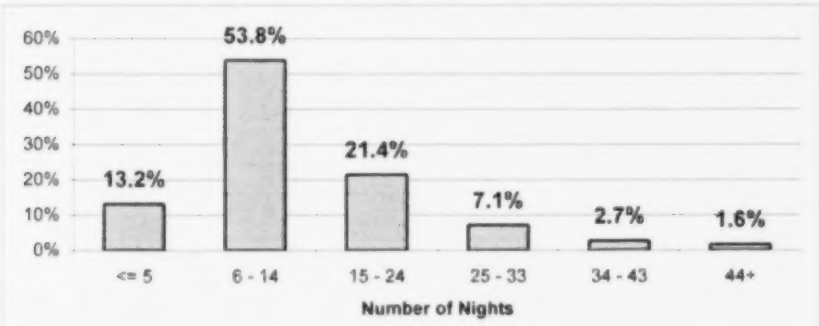
Figure 14: Accommodations Used while in the NWT



LENGTH OF THE TRIP

OUTDOOR ADVENTURE VISITORS SPENT AN AVERAGE of 14 nights in the Northwest Territories during the summer of 2006, longer than the average stay for all visitors overall (9 nights). There was no significant difference in length of stay between guided and unguided adventurers. Figure 15 below presents the frequency of nights spent in the territory for all outdoor adventure visitors. Over 50% spent between one and two weeks in the NWT, and just over 20% spent between two and three weeks in the territory.

Figure 15: Number of Nights Spent in the NWT



PARTY SIZE

THE AVERAGE NUMBER OF PEOPLE IN THE TRAVEL PARTY varied significantly between guided and unguided adventure travellers. The average party size for guided visitors was 4.9 people, whereas the average party size for unguided visitors was 3.5 people. However, for both groups over 45% of parties comprised 2 people (see figures 16 and 17).

Figure 16: Distribution of Party Size, *Guided* Travellers

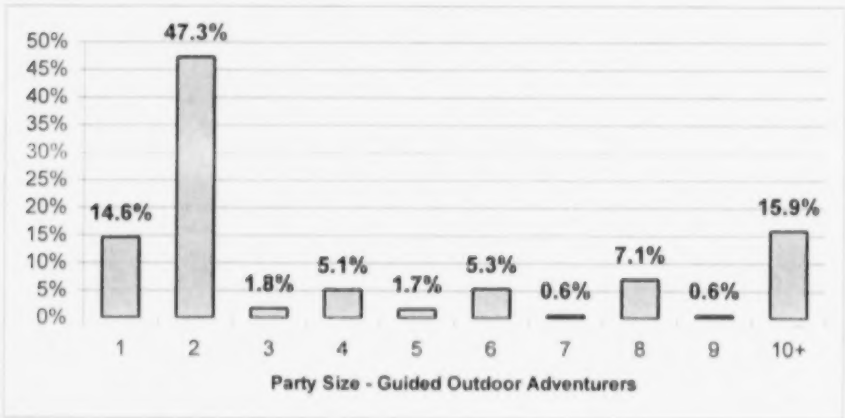
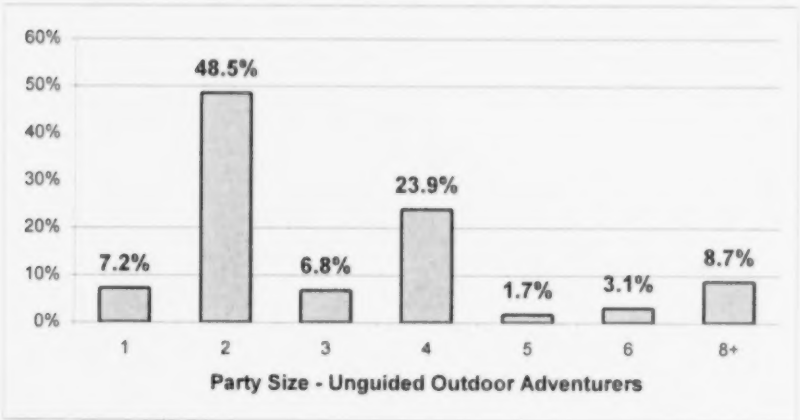


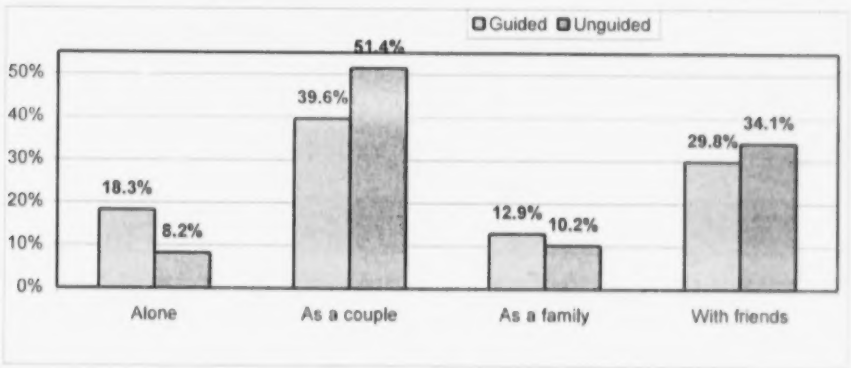
Figure 17 Distribution of Party Size, *Unguided* Travellers



PARTY CHARACTERISTICS

GUIDED ADVENTURE TRAVELLERS (18%) WERE OVER TWICE AS LIKELY AS UNGUIDED VISITORS TO TRAVEL ALONE (8%) on their visit to the NWT. Both guided and unguided adventure travellers were most likely to travel as a couple (40% and 51% respectively), followed by groups of friends at 30% for guided and 34% for unguided parties. While overall, 19% of all visitor parties travelled as a family, this proportion was significantly lower for both guided and unguided outdoor adventure visitors (13% and 10% respectively).

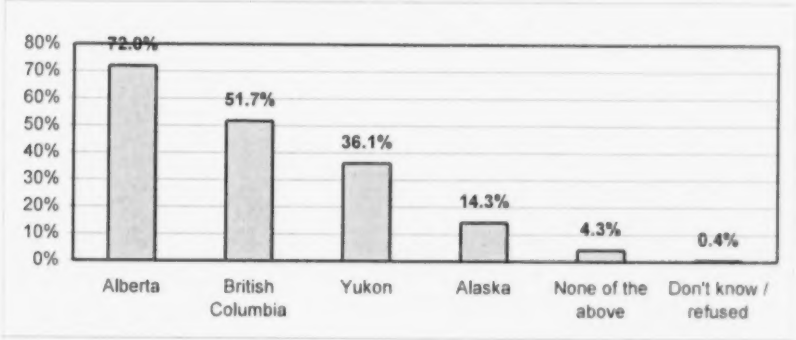
Figure 18: Party Characteristics



OTHER PLACES VISITED DURING THIS TRIP

DURING THEIR TRIP TO THE NORTHWEST TERRITORIES, over 70% of outdoor adventure visitors also travelled through Alberta and just over half travelled through British Columbia. Over 35% travelled through Yukon, and almost 15% of adventure visitors also visited Alaska.

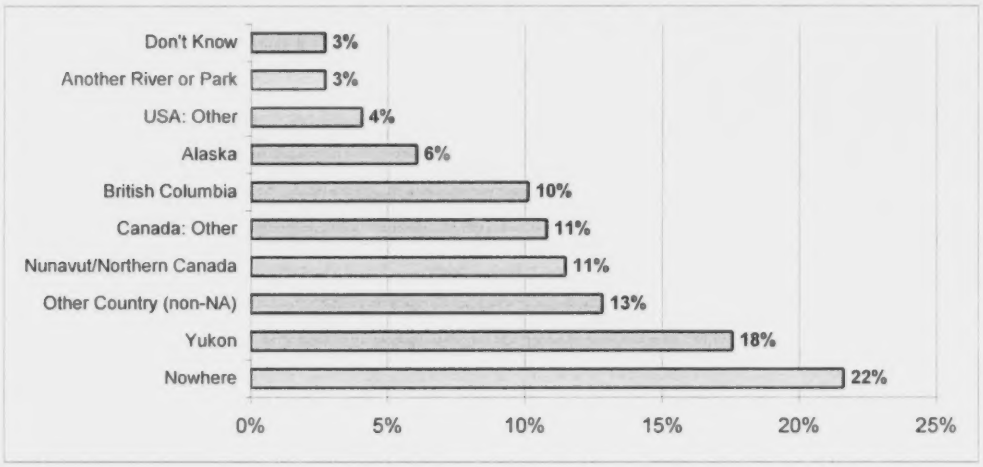
Figure 19: Other Places Visited



ALTERNATIVE VACATION OPTIONS

DURING THE SUMMER OF 2006, over 20% of total responses from adventure travellers who offered an answer indicated no alternative vacation destination to the NWT. Eighteen percent of responses included Yukon as an alternative destination, while another 13% and 11% indicated destinations outside North America or Nunavut and/or other places in northern Canada (not including Yukon) respectively. British Columbia was selected in 10% of responses as alternate vacation choice.

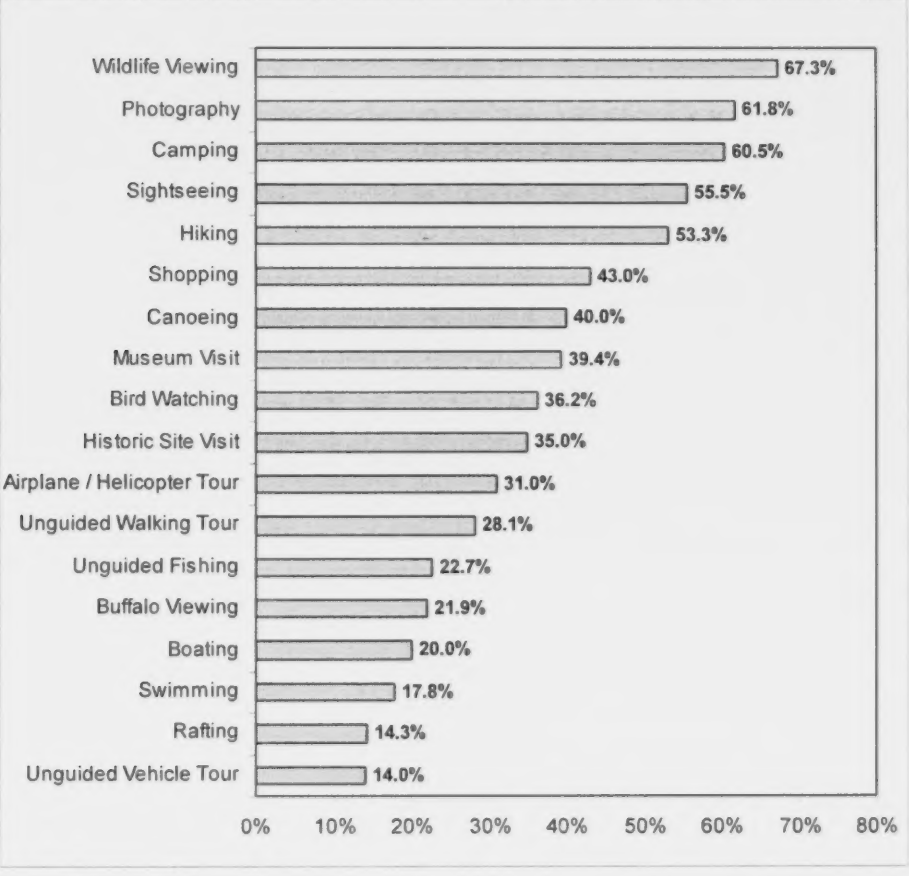
Figure 20: Alternative Vacation Choices



ACTIVITY PARTICIPATION

THE FOUR MOST POPULAR ACTIVITIES that outdoor adventure travellers participated in while in the NWT were wildlife viewing, photography, sightseeing and shopping (excluding camping, which for this segment is considered a form of accommodation on the trip). Canoeing (40%) was over twice as common as rafting (14%), suggesting that many more adventurers took canoe trips than rafting trips. Just over 20% of adventure travellers also fished while in the NWT.

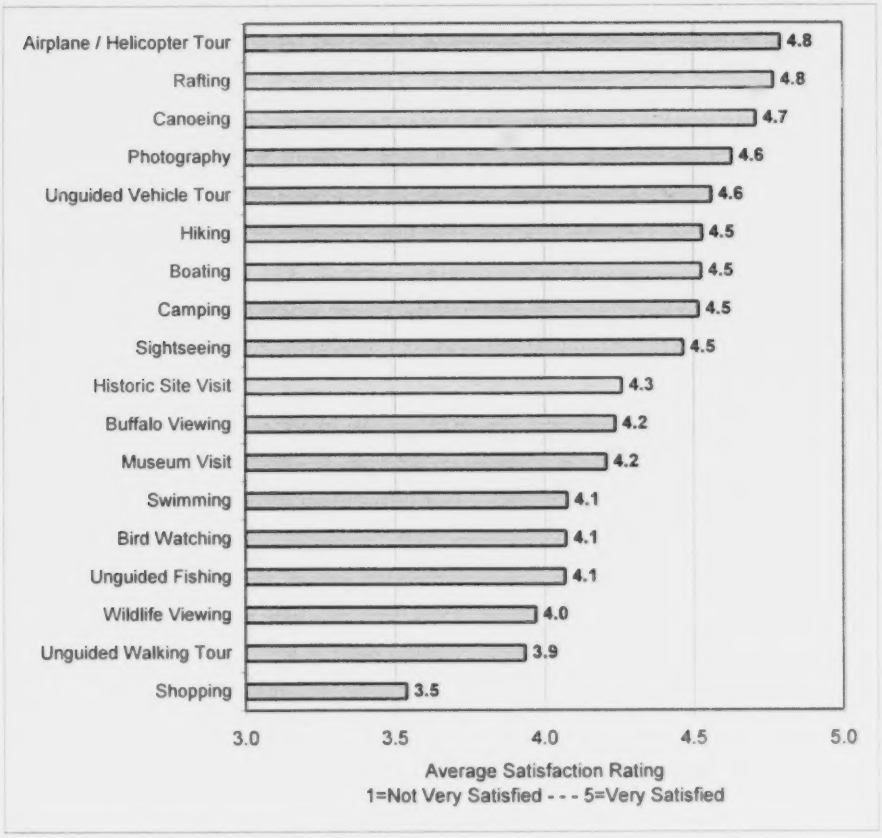
Figure 21: Activity Participation



ACTIVITY SATISACTION RATINGS

ALL ACTIVITIES THAT OUTDOOR ADVENTURE VISITORS participated in received high ratings. On a scale of one to five, with five being the highest possible rating, the lowest average rating was shopping at 3.5. The highest rated activities were airplane or helicopter tours, rafting, canoeing and photography. Given that over 60% of adventurers participated in a canoeing or rafting trip, the high ratings that visitors gave these activities suggests that adventure travellers were very satisfied with their experience.

Figure 22: Activity Ratings



RATINGS OF OUTFITTER SERVICES AND EQUIPMENT

ADVENTURERS WHO PURCHASED A GUIDED TRIP GAVE VERY HIGH RATINGS FOR ALL SERVICES included in the package. Guides were very highly rated, and outfitter value for money, while receiving the lowest rating, was still rated very high (4.5 on average, while the lowest rating received was 3).

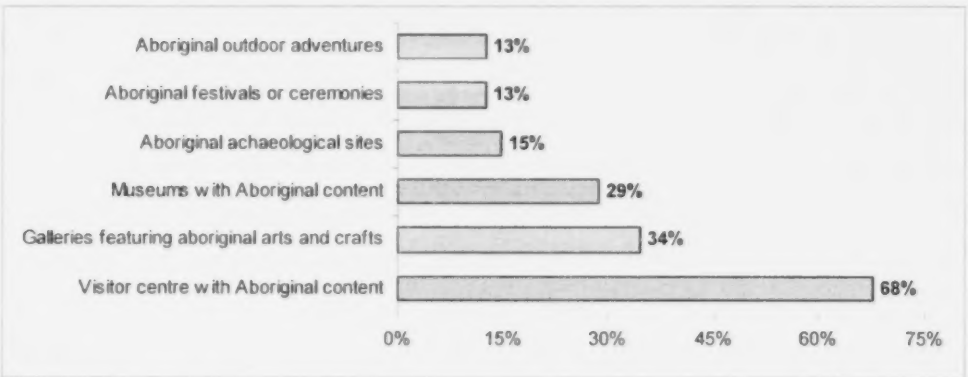
Table 9: Visitor Ratings of Outfitter Services and Equipment

Category	Ratings (1-Very Poor, 5-Excellent)		
	Minimum	Maximum	Mean
Guide	3	5	4.9
Sleeping gear (Sleeping bag, pad)	4	5	4.9
Safety (First Aid Kit, water treatment, bear deterrent)	3	5	4.8
Meals	3	5	4.7
Specialty gear (Wet/Drysuits, helmets)	3	5	4.6
Baggage (Dry bags, dry barrels, backpacks)	3	5	4.6
Tent	2	5	4.6
Mapping (GPS, maps)	3	5	4.6
Boating equipment (Rafts, kayaks, paddles)	2	5	4.6
Kitchen Items (Stove, pots, dishes)	3	5	4.6
Outfitter/lodge - Service & amenities	3	5	4.5
Outfitter/lodge - Value for money	3	5	4.5

PARTICIPATION IN ABORIGINAL TOURISM ACTIVITIES AND EVENTS

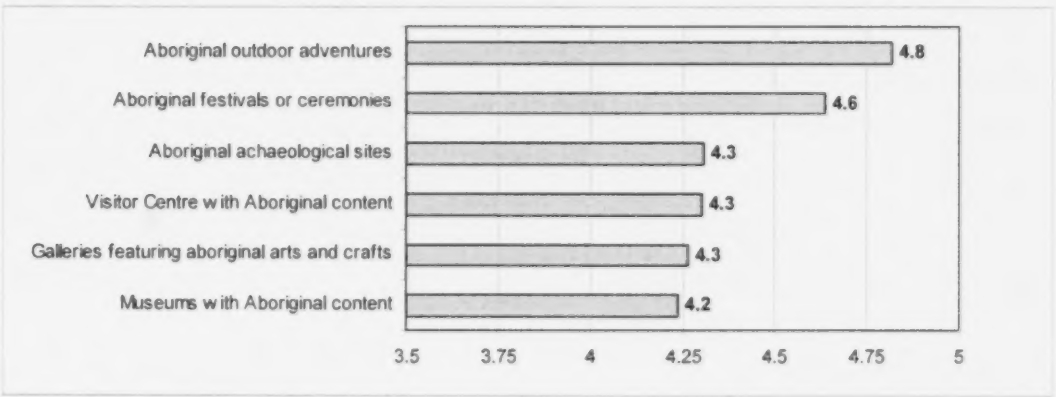
FORTY-SEVEN PERCENT OF OUTDOOR ADVENTURE TRAVELLERS indicated that they participated in an aboriginal tourism event or activity. Of those travellers who indicated that they had participated in an aborignal activity or event, by far the most frequent activity was visiting a visitor centre with aboriginal content (68%), followed by galleries with aboriginal arts and crafts (34%) and then museums with aboriginal content (29%). Attendance or participation in events or activities that involve more active or face-to-face interaction with aboriginal people was much lower than visits to visitor centres, galleries or museums with aboriginal content.

Figure 23: Participation in Aboriginal Events or Activities



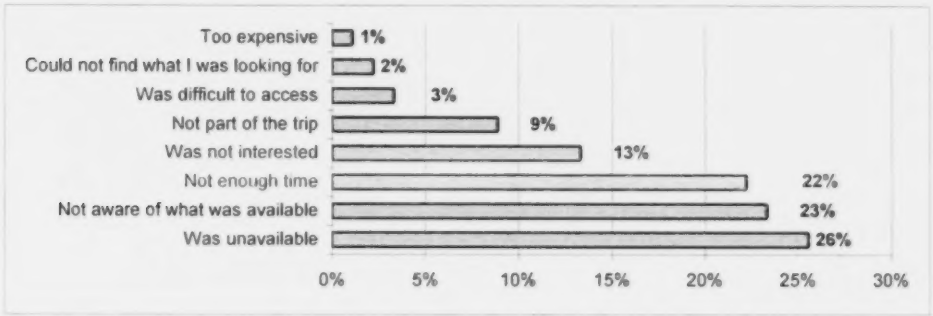
THOSE WHO PARTICIPATED IN AN ABORIGINAL EVENT OR ACTIVITY tended to give high ratings for those activities. Ratings were particularly high for events or activities which required more active involvement of the traveller, in particular, outdoor adventures and festivals or ceremonies.

Figure 24: Aboriginal Activity and Event Ratings



FOR THOSE WHO DID NOT PARTICIPATE IN AN ABORIGINAL EVENT OR ACTIVITY, and responded to the question on why they did not, over one quarter indicated that such events or activities were not available, 23% indicated that they were not aware of what was available, and 22% indicated that time was an issue. Thirteen percent of responses indicated no interest in aboriginal events or activities.

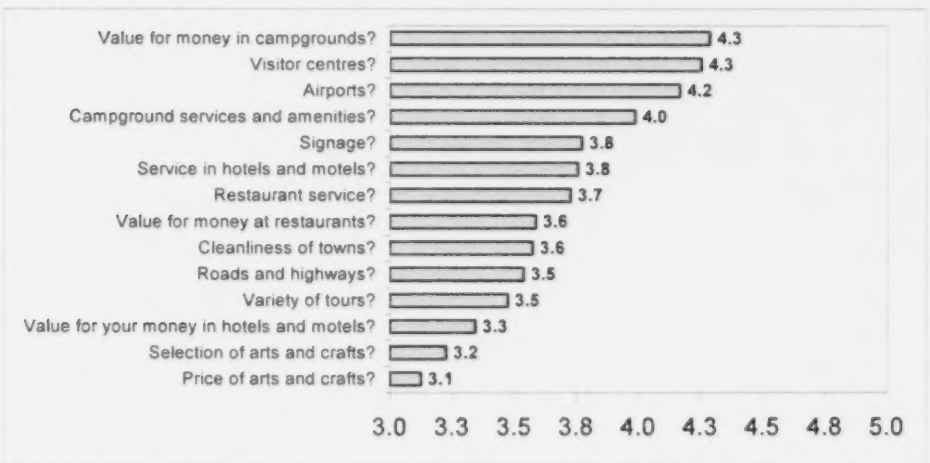
Figure 25: Reasons for not participating in an aboriginal event and activity



TOURISM SERVICE, PRODUCT AND INFRASTRUCTURE RATINGS

THE FIGURE BELOW SHOWS AVERAGE RATINGS for tourism services, products and infrastructure in the Northwest Territories. Although service, quality and selection often rated fairly high, price and value received lower scores with the exception of Campgrounds where value was rated highly. Roads and highways received lower ratings as well, however airports, on average, were rated well. Of all services, products and infrastructure, the territory's Visitor Information Centres and perceived value for money in Campgrounds received the highest average ratings. Notable is the relatively low ratings for selection and price of arts and crafts, and value for money in hotels and motels.

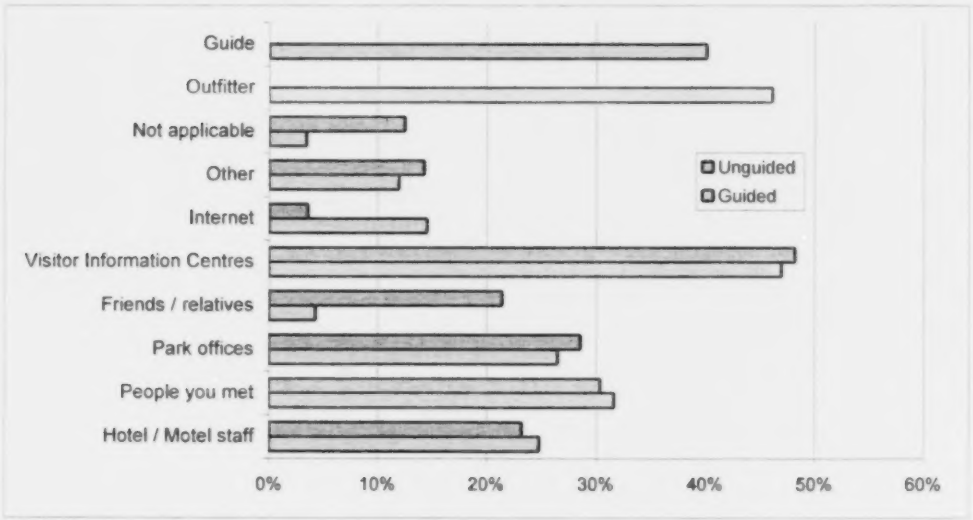
Figure 26: Tourism Service, Product and Infrastructure Ratings



INFORMATION SOURCES USED WHILE IN THE NORTHWEST TERRITORIES

VISITOR INFORMATION CENTRES were used in similar proportions by both guided and unguided outdoor adventurers (47% and 48% respectively) as a source of information while in the NWT. As would be expected, for guided adventurers the outfitter and the guide were an important source of information while in the territory (46% and 40% respectively). However, guided visitors used the internet much more frequently (14.5%) than unguided adventure travellers (3.6%).

Figure 27: Information Sources Used While in the NWT



TRIP EXPENDITURES

TOTAL SPENDING BY OUTDOOR ADVENTURE VISITORS IN THE NWT between May 15 and September 15, 2006, exceeded $7.1 million, including prepaid package costs. Excluding package costs, travellers spent almost $2.5 million in the territory. On average, guided visitors spent $1,405 per person in the NWT compared to $862 per person for unguided travellers (exclusive of pre-paid package costs).

Table 10: Trip Expenditures, Total and Average Per Person

	Guided		Unguided	
	Total Spending	Average Spending	Total Spending	Average Spending
Prepaid Package Cost	$4,304,463	$3,503	$314,529	$357
Total Spending while in NWT - Excluding Package Cost and Cost to get to NWT	$1,726,925	$1,405	$759,656	$862
Total Spending: Including Package (Excluding cost to get to the NWT)	**$6,031,388**	**$4,908**	**$1,074,185**	**$1,218**

ON A PER-PERSON BASIS, GUIDED ADVENTURERS SPENT ALMOST FOUR TIMES AS MUCH on commercial accommodation ($299 per person) as did unguided travellers ($65 per person). Unguided travellers spent more on campground fees on average (an expected observation given the higher frequency of use of campgrounds by unguided visitors) and more on entertainment. Guided visitors, on average, spent almost twice as much on arts and crafts ($125 per person), while spending on souvenirs ($29 per person) was about the same. The average spending on groceries ($39 per person) was very similar between the two groups, but guided adventurers spent almost three times as much on dining in restaurants ($153 per person). Table 11 provides details on expenditures for adventure travellers while in the NWT.

Table 11: Trip Expenditures by Category of Spending and Type of Travellers

Spending in the NWT	Guided		Unguided	
	Total	Average	Total	Average
Commercial Accommodation	$367,695	$299	$57,373	$65
Camping	$9,150	$7	$20,756	$24
Activities / Entertainment	$5,714	$5	$10,446	$12
Arts and Crafts	$153,082	$125	$56,570	$64
Souvenirs	$35,359	$29	$24,967	$28
Tours	$238,595	$194	$13,747	$16
Groceries	$48,235	$39	$37,786	$43
Fuel	$62,401	$51	$69,521	$79
Dining	$187,764	$153	$51,372	$58
Vehicle Rental	$57,541	$47	$23,188	$26
Airfare within NWT	$536,506	$437	$370,754	$421
Other Expenditures	$24,885	$20	$23,178	$26

APPENDIX 1: LEISURE TRAVELLER SURVEY

TRIP CHARACTERISTICS

1. What NWT community or location was your primary destination (hunting/fishing lodge; specific community)? _____

2. Did you fly directly to the NWT?

☐ Yes ☐ No

How many times did you change planes? _____

3. While in the NWT, how did you travel between communities?

Community Name		Plane - Commercial	Plane - Private	Car / Truck - Own	Car / Truck - Rental	RV - Own	RV - Rental	Tour Bus	Other:
From:	To:								
_____	_____	☐	☐	☐	☐	☐	☐	☐	☐
_____	_____	☐	☐	☐	☐	☐	☐	☐	☐
_____	_____	☐	☐	☐	☐	☐	☐	☐	☐
_____	_____	☐	☐	☐	☐	☐	☐	☐	☐
_____	_____	☐	☐	☐	☐	☐	☐	☐	☐
_____	_____	☐	☐	☐	☐	☐	☐	☐	☐
_____	_____	☐	☐	☐	☐	☐	☐	☐	☐
_____	_____	☐	☐	☐	☐	☐	☐	☐	☐
_____	_____	☐	☐	☐	☐	☐	☐	☐	☐

4. Including yourself, how many people are in your travel party? _____

5. Are you travelling:

☐ Alone ☐ As couple ☐ As a family ☐ With friends

6. Including yourself, what are the ages and gender of people in your immediate travel party?

M	F	Age	M	F	Age
☐	☐	_____	☐	☐	_____
☐	☐	_____	☐	☐	_____
☐	☐	_____	☐	☐	_____
☐	☐	_____	☐	☐	_____
☐	☐	_____	☐	☐	_____

7. In total, how many nights did you spend in the NWT? _____

8. Where do you currently live?
   City: _____
   State/Province: _____
   Country: _____

Trip Planning

9. What was the primary focus of your trip?

☐ Fishing:	☐ Guided	☐ Unguided
☐ Hunting:	☐ Guided	☐ Unguided
☐ Outdoor Adventure:	☐ Guided	☐ Unguided
☐ General Touring		
☐ Visiting Friends or Relatives		

10. How many months before your visit did you start thinking about travelling to the NWT? _____

11. How many months before your visit did you make a firm decision to travel to the NWT? _____

12. Which of the following sources did you use when planning your trip to the NWT? (*Please check all that apply.*)

☐ Explorers Guide	☐ TV / Radio	☐ Magazine
☐ Travel Agent	☐ Word of Mouth	☐ Newspaper
☐ Lived here before	☐ Friends / Relatives	☐ NWT 1-800 Number
☐ Outfitter / Tour Operator	☐ ExploreNWT.ca	☐ Other: _____
☐ DehChoTravel.com	☐ Consumer Show: _____	

13. While in the NWT, what sources did you use for information during your trip? (*Please check all that apply.*)

☐ Hotel / Motel Staff	☐ People you met	☐ N/A
☐ Park Offices	☐ Friends / Relatives	
☐ Visitor Information Centres	☐ Internet: _____	
☐ Other: _____		

14. Did you spend part of your current trip in any of the following destinations?

☐ Alberta ☐ British Columbia ☐ Yukon ☐ Alaska ☐ N/A

15. Was this your first trip to the NWT? ☐ Yes ☐ No

16. Please select the top three (3) reasons you chose to visit the NWT:

☐ General Interest	☐ Hunting
☐ Wilderness, isolation, landscape or wildlife	☐ Fishing
☐ Natural phenomenon, event or attraction	☐ Always wanted to visit
☐ Culture or History	☐ Family or Friends
☐ Other: _____	

17. If you had not come to the NWT, where would you have gone?
_____

TRIP ACTIVITIES

18. Please rate the following activities or tours you or anyone in your party participated in? (*If you or your party did not participate in the activity, please choose N/A.*)

	Not very satisfied				Very Satisfied	N/A	Comments
Airplane/Helicopter Tour	1	2	3	4	5	☐	
Arts Festival	1	2	3	4	5	☐	
Aurora Viewing	1	2	3	4	5	☐	
Biking	1	2	3	4	5	☐	
Birdwatching	1	2	3	4	5	☐	
Boating	1	2	3	4	5	☐	
Buffalo Creep	1	2	3	4	5	☐	
Camping	1	2	3	4	5	☐	
Canoeing	1	2	3	4	5	☐	
Cruise	1	2	3	4	5	☐	
Cultural Event	1	2	3	4	5	☐	
Fishing: Guided	1	2	3	4	5	☐	
Fishing: Unguided	1	2	3	4	5	☐	
Hiking	1	2	3	4	5	☐	
Historic site visit	1	2	3	4	5	☐	
Hunting: Guided	1	2	3	4	5	☐	
Hunting: Unguided	1	2	3	4	5	☐	
Museum visit	1	2	3	4	5	☐	
Music Festival	1	2	3	4	5	☐	
Photography	1	2	3	4	5	☐	
Rafting	1	2	3	4	5	☐	
Sailing	1	2	3	4	5	☐	
Shopping	1	2	3	4	5	☐	
Sightseeing	1	2	3	4	5	☐	
Swimming	1	2	3	4	5	☐	
Town tour: walking-guided	1	2	3	4	5	☐	
Town tour: walking-unguided	1	2	3	4	5	☐	
Town tour: vehicle-guided	1	2	3	4	5	☐	
Town tour: vehicle-unguided	1	2	3	4	5	☐	
Whitewater Kayaking	1	2	3	4	5	☐	
Wildlife Viewing	1	2	3	4	5	☐	
Other: _____	1	2	3	4	5	☐	

19. Were there any activities that you hoped to do, but were not available?

☐ Yes ☐ No

Which activities? _____

_____

20. Did you participate in any Aboriginal events or activities, or visit any specific Aboriginal sites while in the NWT?

☐ Yes

Please rate your satisfaction with the following Aboriginal sites, events and activities. (*If you did not visit the site or take part in the event or activity, please choose N/A.*)

	Not very satisfied				Very Satisfied	N/A
Visitor centres with aboriginal content	1	2	3	4	5	☐
Aboriginal archaeological sites	1	2	3	4	5	☐
Museums with aboriginal content	1	2	3	4	5	☐
Aboriginal festivals / ceremonies	1	2	3	4	5	☐
Galleries featuring aboriginal arts and crafts	1	2	3	4	5	☐
Aboriginal outdoor adventures	1	2	3	4	5	☐
Other: _____	1	2	3	4	5	☐

☐ No

Why not? (*Please choose all that apply.*)

☐ Was not interested
☐ Too expensive
☐ Was not available
☐ Was difficult to access
☐ Could not find what I was looking for
☐ Not aware of what was available
☐ Other: _____

Comments about Aboriginal Tourism in the NWT: _____

_____

21. Did you visit a National Park while in the NWT?

☐ Yes

Which park(s)? _____

☐ No

Why not? _____

22. What type of accommodations did you use on your trip? (*Please check all that apply.*)

☐ Home of friends or relatives	_____ nights	*Please indicate how many nights you stayed at each type of accommodation.*
☐ Roadside pullout	_____ nights	
☐ Wilderness camping	_____ nights	
☐ Outfitters lodge / camp	_____ nights	
☐ Cabin rental	_____ nights	
☐ Hotel / motel	_____ nights	
☐ Government Campground	_____ nights	
☐ Bed & Breakfast	_____ nights	
☐ Other: _____	_____ nights	
☐ Did not stay overnight		

23. When choosing a vacation destination, how important to you are the following considerations?

	Not at all important				Very important
Experiencing nature with a guide	1	2	3	4	5
Unique or different cultural groups	1	2	3	4	5
Physical adventure	1	2	3	4	5
Personal challenges	1	2	3	4	5
Learning opportunities	1	2	3	4	5
Viewing wildlife	1	2	3	4	5
Outstanding scenery	1	2	3	4	5
Opportunity to purchase arts and crafts	1	2	3	4	5
Meeting new people	1	2	3	4	5
Parks and wilderness areas	1	2	3	4	5
Cost of accommodation and meals	1	2	3	4	5
Package tours to destination	1	2	3	4	5
Exciting nightlife and entertainment	1	2	3	4	5
Luxury accommodations	1	2	3	4	5
Opportunities to take organized tours	1	2	3	4	5
Interesting shopping	1	2	3	4	5
Having fun, being entertained	1	2	3	4	5
Personal safety	1	2	3	4	5
High standards of cleanliness and hygiene	1	2	3	4	5
Warm, sunny climate	1	2	3	4	5
Reliable weather	1	2	3	4	5
Cost to get to destination	1	2	3	4	5
Relaxing break from work	1	2	3	4	5

24. Please rate the following services, products and infrastructure on a scale of 1 to 5, where 1 is very poor and 5 is excellent? (*Please choose N/A if the service, product or infrastructure does not apply to you.*)

	Very poor				Excellent	N/A
Hotels/motels – Service	1	2	3	4	5	☐
Hotels/motels – Value for Money	1	2	3	4	5	☐
Campgrounds – Service & Amenities	1	2	3	4	5	☐
Campgrounds – Value for Money	1	2	3	4	5	☐
Restaurants – Service	1	2	3	4	5	☐
Restaurants – Value for Money	1	2	3	4	5	☐
Arts and Crafts – Selection by type of good	1	2	3	4	5	☐
Arts and Crafts – Selection by price	1	2	3	4	5	☐
Signage	1	2	3	4	5	☐
Roads and Highways	1	2	3	4	5	☐
Airports	1	2	3	4	5	☐
Visitor Centres	1	2	3	4	5	☐
Variety of Tours	1	2	3	4	5	☐
Cleanliness of Towns (litter)	1	2	3	4	5	☐

TRIP EXPENDITURES

Prices listed below are in: ☐ *Canadian Dollars* ☐ *US Dollars*

25. Did you have any prepaid package costs for this trip?
☐ Yes – Total cost for your group: $_____ ☐ No

26. Aside from any prepaid package costs, how much did your party spend on getting to the NWT? $_____

27. While in the NWT, how much did your party spend on the following items?

Accommodation:	
Hotels	$_____
Bed & Breakfasts	$_____
Camping	$_____
Tours	$_____
Fuel	$_____
Vehicle / Boat Rental	$_____
Airfare	$_____
Entertainment	$_____
Arts and Crafts (prints, carvings)	$_____
Souvenirs (mugs, t-shirts, pins)	$_____
Groceries	$_____
Restaurants	$_____
Other: _____	$_____
Other: _____	$_____

DEMOGRAPHIC INFORMATION

28. What is the highest level of education you have achieved?

☐ Less than high school
☐ High school
☐ Some technical college / university
☐ College / Technical Diploma
☐ University Degree
☐ Masters / Ph.D. Degree

29. Which category best describes your current occupation?

☐ Professional
☐ Trades
☐ Health care
☐ Retired
☐ Management
☐ Clerical
☐ Self-employed
☐ Unemployed
☐ Education
☐ Retail
☐ Student
☐ Other: _____

30. In which range is your approximate household income?

☐ Under $30,000
☐ $30,000 - $49,999
☐ $50,000 - $69,999
☐ $70,000 - $89,999
☐ over $90,000

31. Are there any other comments you would like to make about your visit to the Northwest Territories?

_____

_____

Thank you for your time!
We appreciate your help in our effort to further understand and improve the tourism industry within the Northwest Territories.